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ATTACHMENT II

OTHER MANAGEMENT IMPROVEMENTS

Documentation, Correspondence and Form Processing

Because of the nature of this Staff, reporting and documentation of work performed in counterintelligence research must be by detailed, often lengthy, memorandum. Except for highly compartmented activity, original copies of such research reports are placed in appropriate security files; where compartmentation is required either by regulation or topic matter, appropriate security files are flagged with reference to compartmented files retained in this Staff or by other cooperating non-Office of Security Agency elements.

Correspondence with other Agency elements and liaison is by memorandum. However, for correspondence with other elements of the Office of Security, we lean heavily on the "speed letter." We encourage requestors to utilize the form whenever possible to allow single-sheet documentation of both the request, work performed and response. Certain other forms, originated by other OS elements with a high frequency of referral to this Staff, are also utilized to a high degree to reduce memoranda.

This Staff presently has only one internally generated and forms management approved form, that being a control card for security files moving into, about and from the Staff. It has proven much more effective than chronological control books previously used by this Staff and still in use by many OS elements.

I have examined our present procedures, and see only one possible area for reduction of Staff effort in correspondence, that being implementation of a requirement that OS requestors of special source checks extract the necessary information from files, i.e. names and biographic data, prior to submission to us. (At present, this action is performed by this Staff upon receipt of the pertinent security files.) Because the requestors are generally unfamiliar with the significant data necessary for the unique source checks, and the frequent changes in data requirements by source managers, I have concluded that to have the requestors do the extracting would probably be more time-consuming and generate more problems than it would resolve.

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Coordination

Coordination with other Agency and Office of Security elements is generally conducted on a verbal basis and documented by notation or memorandum for the record (depending on the importance of the situation or complexity of the coordination), or by use of the several coordination forms generated for specific purposes by other OS elements. External coordination, including liaison, is always documented by memorandum. Although I agree with the concept that coordinations are best kept to a minimum, the very nature of Staff operations requires a high degree of coordination. These are routine procedures and are not a major management factor for this Staff.

SOP's

Because of the widely-varied requirements upon this Staff, the tasks performed and the wide-ranging source and liaison contacts, both internally and externally, firm SOP's are not the practice. Rather, I exercise administrative and case management on a situation basis through the Deputy Chief and the respective Branch Chiefs.

SRS does have certain procedures, perhaps best described as "unwritten laws" which are akin to SOP, though not formally designated as such.

One such procedure relates to response to inquiries addressed to this Staff. Unless appropriately justified to me, such requests for information are given high priority response and in no case should exceed three working days. The use of this procedure enables me, as a manager, to monitor all on-going matters which might require inordinate research or Staff work, and to give direction, both as to priorities and to work method. (This, of course, is not applicable to those matters in which we are merely the channel to certain external source programs and governmental liaison officers, in which case response time must necessarily hinge upon the performance of those sources and liaison officers.)

I require that source reports be generated on all items of security interest or where security action appears necessary. Depending on the degree of urgency of the requisite action anticipated, response ranges from immediate and verbal to three days and written.

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I do not establish deadlines for analysis of special intelligence input because of the limited man-hours which can be devoted to it and the large, continuing backlog, but insist that all material be screened upon receipt to assure that immediate action items are identified and acted upon without further delay.

Of course, strict compartmentation is enforced in regard to special source, source, program, liaison and other programs where such is required.

One practice, although not a firm SOP, is also worthy of note in sharing management experience. In the past several years we have faced extreme operational hardship with the successive reductions in clerical personnel. Because of the detailed reporting required by research, so-called "short-form" documentation of work is not effective or desirable. To facilitate production and to relieve clerical personnel of time-consuming transcription and report drafting, I have long encouraged Staff members with typing skills to type and correct all research drafts prior to referral to clerical personnel for final typing. As a result, ten of our fourteen professionals exercise this option and make due use of "cut and paste" before final reports are prepared, frequently tempting me to aggressively encourage acquisition of typing skills by the remaining officers. The Office of Security might well give serious consideration to that temptation, and encourage greater use of preliminary typing by those OS professionals having typing skills and acquisition of those skills by professionals lacking in them.

(In line with experience sharing, it might be well here to offer another suggestion to deal with the adverse effects of past and contemplated reductions in secretarial personnel. Presently, with authorized secretarial personnel working at near-maximum effective output, we are sorely pressed when one of them is on sick or annual leave. I am certain this is also a problem confronting other OS components. It might be well to consider a limited-size pool of clerical-typing generalists, well-schooled in overall OS procedures and organization, who could be assigned to this and other OS units on a temporary basis during extended absence on sick or annual leave by regularly assigned personnel.)

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Other Management Work Load Factors

At the present time, it can be stated quite frankly that work load of assigned tasks exceeds personnel available to perform the tasks. To effect further reduction in professional manpower within this Staff, policy decisions must be made as to which tasks should be totally discontinued or transferred to other OS components.

An examination of our priority functions in this light is appropriate:

Priority One - Counterintelligence research involving
CIA employees and assets, with particular emphasis
on Soviet Bloc penetration operations, including
Projects [REDACTED]

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It is not feasible

25X9

to reduce this operation. Total elimination of this item would reduce Staff requirements by [REDACTED] professionals with a rough estimate of savings of [REDACTED] (present cost less resettlement). Transfer of the function is not feasible because of its inter-relation with other Staff efforts.

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Priority Two - Counterintelligence Liaison Program
(USIB Agencies and Police. This remains a high production, quick response activity, performing this service not only for this Staff, but for other elements of the Office of Security and limited elements of the DD/P. This activity cannot be eliminated. Transfer of this function would involve [REDACTED]

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Priority Three - Counterintelligence Sources and Assets Program, including Projects [REDACTED] compartmented, unilateral and "unique" sources.

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This priority involves [REDACTED] professionals and cannot be eliminated. However, certain aspects of it could effectively operate in other OS components. For example, Projects [REDACTED] require

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[REDACTED] professionals and about [REDACTED] annually. There is no need for them to remain within SRS, particularly

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[REDACTED] which was originally within PTOS.
[REDACTED] has been an SRS project since inception.) Transfer of the projects to the prime consumer, PS, for example would reduce personnel and expenditures of this Staff, but would not reduce staffing and budgetary allocation of the Office of Security.

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One other portion of this priority item could reasonably be transferred, provided certain coordination would be successful. This relates to a special source check involving "unique" information. This special check is multi-sourced, one portion of which is with certain materials available to [REDACTED] but not routinely reviewed by [REDACTED]

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If the other sources would agree, the channel for review of their materials could be transferred from this Staff to [REDACTED] which could conduct the entire multi-source review. The gains from this, however, would be small, since only about .2 professionals are involved in the non-[REDACTED] check portion at this time.

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The Staff's counterintelligence review of special intelligence materials also fall within this priority, utilizing materials which it has been determined are not exploited elsewhere in the Agency. It has been highly productive, and requires extensive security name trace activity, documentation and flagging of files and maintenance of the SI in approved facilities. It does not appear this portion of the program can be transferred to another OS element and it is inconceivable we would opt to eliminate this segment of our sources program.

Priority Four - External Liaison (non-USIB agencies) on highly sensitive security matters. This activity, involving .15 personnel and no expenditure, is a maintenance program only, and is not operating at its full potential. It exists by long standing agreement to service special requests from certain

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non-USIB agencies and to obtain privileged information from them. SRS is a major customer for this service, but other elements of OS are also served. It would not be feasible to reduce or transfer this activity.

Priority Five - Counterintelligence Research (including exploitation, harassment and penetration operations directed against the Agency) by the Peoples Republic of China and all non-Bloc hostile and "friendly" intelligence and security services. This program involves only 1.1 professionals and is severely understaffed to meet such an all-encompassing threat. Obviously it cannot be reduced, nor is it feasible for transfer because of its interrelation with other Staff efforts.

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Priority Six - Development, management of channels and sources not usually available; monitoring external influences affecting Agency personnel, sources and methods. This activity involves .7 professionals and expends about [redacted] annually. It is not feasible to reduce this program because of a number of continuing factors, including productivity. As it now exists, it would not be feasible to transfer this activity.

Priority Seven - Monitor special sources regarding foreign investigation of U.S. citizens alleged to be involved in narcotics traffic, compile and research to assure no Agency involvement. This activity compliments, but does not duplicate the high priority anti-narcotics traffic activity conducted by DD/P/CI. Compartmented access and storage is a significant portion of the documentation handled which limits transferability of the effort to other OS elements. This particular phase, involving .3 personnel and no expenditures, is necessary within the Office of Security because the researchers need full name check access of Office of Security records, hence it is a portion of

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the overall problem which CI staff cannot handle alone. (The only alternative is for CI Staff to reclaim this aspect and then have a point of contact in OS to obtain full traces of SR&CD holdings; this presents certain information release problems--of which we have considerable experience--which precludes further consideration of this alternative.)

Priority Eight - Conduct counterintelligence research as directed, as raised by other Agency components and by other U.S. Government agencies. This is the "miscellaneous" portion of our research effort and involves 1.85 personnel and no expenditures. It is closely interrelated with other Staff research and cannot be transferred. Since it is operating at a minimum level at the present, it holds little promise for reduction and elimination could not be complete.

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ATTACHMENT III

PERSONNEL REDUCTIONS

As indicated earlier, we have programmed for the reduction of one clerical position for the Fiscal Year ending 30 June 1973, and have braced ourselves for the possible reduction of an additional professional position in the indefinite future. These are not conducive to effective operations of this Staff, and are accepted only as managerial necessities.

Examination of our priority programs reflects that any significant personnel reductions can be obtained through elimination of entire programs or reductions within the Staff, but not the Office of Security, by transfer of certain efforts to other OS elements.

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ATTACHMENT IV

MONETARY SAVINGS

As with the previous attachment, only total elimination of certain programs would result in significant monetary savings. Such is at present most impractical and would render the Agency highly vulnerable. Certain potential for function transfer previously mentioned would result, in some programs, with a reduction in Staff expenditures but not Office of Security expenditures.

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OS GOALS/PRIORITIES
REPORT

ATTACHMENT V

GOAL	PRIORITY NO.	Is objective being performed as required by OS mission/functions [REDACTED] 25X1A			COORDINATION		REDUCTIONS/SAVINGS	
		Yes	Partially	No	Internal	External	Personnel	Funds
Conduct counterintelligence research involving CIA employees and assets (i.e. Staff, contract, proprietary, industrial and operational) with particular emphasis on Soviet Bloc penetration operations. (Including Projects [REDACTED] and [REDACTED] 25X1A)	1	Yes paras 2 (o) and 2 (g)			OS customers	D/CI DD/P/CI DD/P/SB FBI affected Agency personnel and appropriate CIA components	Not feasible to reduce If totally eliminated would produce: 25X9	[REDACTED]
Counterintelligence Liaison Program (US [REDACTED] Agencies and police)	2	Yes paras 2 (b) and 2 (k)			OS customers	DD/P customers and USIB and police organizations involved	[REDACTED]	[REDACTED]
Counterintelligence Sources and Assets Programs, including Projects [REDACTED] 25X1A Compart- [REDACTED] 25X1A mented, Unilateral and "unique" sources	3	Yes para 2 (d)			OS customers	Sources of data (would include costly termination for some) 25X1A	[REDACTED]	[REDACTED]

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OS GOALS/PRIORITIES
REPORT

GOAL	PRIORITY NO.	Is objective being performed as required by OS mission/functions			COORDINATION		REDUCTIONS/SAVINGS	
		Yes	Partially	No	Internal	External	Personnel	Funds
External Liaison (non-USIB agencies) on highly sensitive security matters	4	Yes paras 2(b) and 2 (k)			OS customers	Govt. agencies involved 25X9	Not feasible to reduce If transferred from Staff or if totally eliminated	
Counterintelligence Research involving Peoples Republic of China and both non-Bloc hostile and "friendly" intelligence services, to include exploitation, harassment and penetration.	5	Yes paras 2 (o) and 2 (g)			OS customers	DD/P/CI, affected Agency personnel, and appropriate CIA components		
Development, management of channels and sources not usually available; monitoring external influences affecting Agency personnel, sources and methods	6	Yes paras 2 (b) and 2 (o)			OS customers	DD/P/CI, appropriate CIA components and the sources of this data		

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OS GOALS/PRIORITIES
REPORT

GOAL	PRIORITY NO.	Is objective being performed as required by OS mission/functions [REDACTED] 25X1A			COORDINATION		REDUCTIONS/SAVINGS	
		Yes	Partially	No	Internal	External	Personnel	Funds
Monitor special sources regarding foreign investigation of U.S. citizens alleged to be involved in narcotics traffic, compile and research to assure no Agency involvement.	7	Yes para 2 (d) and 2 (g)			OS customers 25X9	DD/P/CI, appropriate CIA components	Not feasible to reduce If <u>totally</u> eliminated would produce:	[REDACTED]
Conduct counterintelligence research as directed, as raised by other Agency components and other U.S. Government Agencies.	8	Yes para 2 (o) and segments of others			OS Management and customers	DD/P/CI appropriate CIA components, appropriate U.S. Govt. agencies		